

# Project Close-Out

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## Close-out Overview

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### Project Close-out Overview

The last major process of a project's life cycle is the project close-out process.

Closing a project should be a fairly routine process. The key elements to project close-out are:

- Accepting the project's products indicated by customer sign-off, Project Sponsor, and the Steering Committee, as appropriate
- Conducting a Lessons Learned session
- Completing the Post Implementation Evaluation Report (PIER)
- Recognizing outstanding work
- Celebrating the achievements of the Project Team
- Disbursing the resources—staff, facilities and automated systems
- Completing and archiving all final project records.

These activities are particularly important on large projects with extensive records and resources.

This chapter does not address processes for transitioning the technical support into maintenance and operation. These tasks are diverse and unique to the specific development environment of a project.

The first step of the close-out process is the customer's acceptance of the final deliverables of the project. This is a critical and important step, as the customer signs off that the scope of the project and deliverables are complete. Acceptance is based upon the success criteria defined in the very early initiating and planning processes. This acceptance should be formal, meaning that physical sign-offs should be obtained.

# Project Close-Out

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## Creating the PIER

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### Learning Lessons

#### ***Conduct a Lessons Learned Session***

In addition to communicating the closure of a project in writing, it is also advisable to have a mechanism for group review. A “lessons learned” session is a valuable closure mechanism for team members, regardless of the project's success. Some typical questions to answer in such a session include:

- Did the delivered product meet the specified requirements and goals of the project?
- Was the customer satisfied with the end product?
- Were cost budgets met?
- Was the schedule met?
- Were risks identified and mitigated?
- Did the project management methodology work?
- What could be done to improve the process?
- What bottlenecks or hurdles were experienced that impacted the project?
- What procedures should be implemented in future projects?
- What can be done in future projects to facilitate success?
- What changes would assist in speeding up future projects while increasing communication?

The lessons learned session is typically a meeting that includes:

- Project Team
- Stakeholder representation including external project oversight, auditor or QA
- Executive management (optional)
- Maintenance and operations staff
- Project Sponsor (optional)

Such a session provides official closure to a project. It also provides a forum for team member recognition and offers an opportunity to discuss ways to improve future processes and procedures.

#### ***Document Lessons Learned***

One purpose of the PIER is to document lessons learned. This means that problems encountered by the Project Team are openly presented. Problem identification on completed projects provides a method to discuss the issue in hopes of eliminating its occurrence in future endeavors. It is important, however, that the problem discussions do not merely cast blame. Responsibility and ownership for problem areas are critical to developing useful recommendations for future processes.

Problems that were encountered should be prioritized with focus on the top five to ten problems. One should not attempt to address every problem.

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## Creating the PIER

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### Creating the PIER

#### ***What is a Post Implementation Evaluation Report?***

A Post Implementation Evaluation Report (PIER) documents the history of a project. It provides a record of the planned and actual budget and schedule. The report also contains recommendations for other projects of similar size and scope.

The PIER will be stored on the state agency's database as well as a link to the agency at ITSD. The PIER Table of Contents should look like the following:

- Project organization including staffing and skills
- Schedules, WBS
- Successful risk assessment and mitigation techniques, i.e. what risks occurred and what techniques were used to mitigate these risks
- Processes used for configuration management and quality assurance
- General techniques used for project communication
- General techniques for managing customer expectations
- Short-term success factors and how they were met
- Financial data
- Culture or environment
- Lessons learned (from the Lessons Learned session)
- Recommendations to future project managers

Be certain that successes as well as problems on the project are identified in the PIER. Be certain to include new ideas that were very successful on the project. Make recommendations on how these processes might be adapted for other projects.

Share the project successes with other organizations. In the same way that problem identification can lead to improvements, successes must be shared so they can be repeated. Where possible, successes should be translated into procedures that will be followed by future projects.

#### ***Who Prepares the Report?***

The Project Manager has responsibility for preparing the report. The Project Manager gets input from the Project Team, the customers and other major stakeholders. People performing different functions on the project will have a different outlook on the successes and failures and on possible solutions. If every project member cannot be consulted, at least ensure that a representative from each major area of the project participates. The customers' overall view of the project and its final product is also a major focus of the project. It is this view, along with the view of the major stakeholders, which lives on after closure has been completed.

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## Recognizing Excellence and Celebrating Success

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### Celebrating

#### ***Recognition of Success***

Celebrate the success of completing a project!

There is fairly universal recognition that positive reinforcement, or rewarding behavior, is an effective management tool. Since it is a goal within the State to execute all projects successfully, it is important to recognize teams that have met this goal. When success in a project is achieved, be certain to provide some recognition to the Team. If individuals are singled out for significant achievements, don't forget to recognize the entire Team as well.

*"Compensation is what you give people for doing the job they were hired to do. Recognition, on the other hand, celebrates an effort beyond the call of duty."*

Management may also want to express recognition of a successful team effort by praising the Team at a key meeting or a large gathering of staff. People are proud to have senior management appreciation stated, and such recognition sets the stage for future successful work.

Formal recognition can also be achieved through coordination with the Missouri ITSD for articles in industry periodicals and by updating the project data that is circulated to the legislature.

#### ***What is Success?***

The specific success factors for a specific project are defined in the early stages of the planning process. And, we know that on-time and on-budget are always an implied definition of project success. However, success is not tied only to budget and schedule. Many projects can be considered successful even though the project did ultimately cost more than had been anticipated if they successfully addressed the business problems that needed to be addressed.

Some key questions that determine success are:

- Were the success factors achieved?
- Do the stakeholders, particularly customers, view the project in a positive manner?
- Was the project well-managed?
- Did the Team work well together?

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## Archiving

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### Archiving

#### ***Collecting Project Data***

Following preparation of the PIER, the project database is archived. Historic project data is an important source of information to help improve future projects.

Typically, the following project data is archived:

- PIER
- Project Plan
- Checklist
- Project management control documents
  - ⇒ Correspondence
  - ⇒ Relevant meeting notes
  - ⇒ Status reports
  - ⇒ Contract files
- Technical documents
- Information that had been placed under configuration control.

All records, both electronic and hard copy, should be stored following record retention guidelines. The technical records will be turned over to the personnel responsible for maintenance and operation of the system. The project archive includes a description of the files being submitted, the application (including version) used to create the archived materials and a point of contact if further information is needed.

#### ***Where is the Archive Maintained?***

ITSD will maintain an archive of State information technology projects that includes only project summary information. The more detailed information is archived at the state organization. The archive at ITSD will be available on the ITSD website.

#### ***How is the Archived Material Used?***

Building a repository of past projects serves as both a reference source for estimating other efforts and as a training tool for project managers.

Project archives can be used when estimating projects and in developing metrics on probable productivity of the new project teams. Use of past performance metrics provides the best source for future estimates.

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